

Welcome! New Commission Staff Orientation



*We'll get started in just
a couple of minutes.*

*Please be sure to
access the Audio link in
Adobe Connect.*



AmeriCorps Staff Development Series May 24, 2018

Orientation for New Commission Staff



Technology Check



- Check the Connect Web Links to access today's PPT and training evaluation.
- Today's presentation is being recorded, and it will be posted on the Knowledge Network in June:
www.nationalservice.gov/resources/americorps
- We will use the Chat box throughout today's presentation. Let's test the Chat feature; please type a short greeting to your colleagues now.

Purpose of the Staff Development Webinars

- In general, the 2018 AmeriCorps Staff Development Series is designed to build knowledge in core program and grant management areas to support strong service across the network.
- The webinars are intended to give commission and program staff a break from the day-to-day demands of grant management and focus on broader, longer-term issues.

AmeriCorps Staff Development Series

The 2018 webinar series includes:

- Continuity Planning
 - How to Review Data Collection Plans
- ***Orientations for New Commission and Program Staff***
 - Financial Management
 - Criminal History Check Management
 - AmeriCorps Member Orientation and Training
- Member and Site Monitoring and Reporting Requirements
 - Submitting Grantee Progress Reports
 - Data Quality Monitoring

Today's Target Audience

- State Service Commission staff who are new to their jobs and/or directly involved in orienting new employees at the state commission.

Webinar Purpose



Today's presentation is designed to:

- ✓ Provide an overview of key knowledge and skills needed by commission staff to be effective AmeriCorps grant managers and CNCS partners
- ✓ Highlight important information new commission staff need in first week and month on the job
- ✓ Share best practices and lessons learned

How to use this webinar material:

- ✓ For new staff, we hope this is immediately relevant and helpful to your jobs; we hope the CNCS info is new and applicable to you now
- ✓ For existing staff, we hope that you'll see information or training techniques that could inform your existing staff orientations

Today's CNCS Presenters

- **Beth Binkley**

Program Officer

AmeriCorps State and National

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- **Barbara Ellen Reynolds**

Senior Program and Project
Specialist

AmeriCorps State and National

breyolds@cns.gov



Today's Agenda



- Getting Oriented in Washington:
 - Amber Martin-Jahn, Serve Washington
- Commission Staff Key Knowledge
- Commission Staff Key Skills
- Possible Phases of Learning for New Staff
- The CNCS Relationship
- Getting Oriented in Massachusetts:
 - Katie Koski and Beth McGuinness, Massachusetts Service Alliance
- Resources
- Q&A and Wrap-up

Getting Oriented in Washington

Amber Martin-Jahn
Executive Director
Serve Washington



Unique Role of Commissions in National Service

CNCS Partners:

- Share grant-making functions of ASN program grants
- Share outreach, training, and technical assistance functions
- Share compliance monitoring, reporting, and evaluation
- Share charge to promote service and volunteerism

CNCS Prime Grantees:

- Manage grant implementation and compliance requirements for commission operations and subgrantees (may include Competitive and Formula)
- Receive primes, VGF, CSG, CIF grants

What should commission staff know?

As key CNCS partners and leaders in national service, commission staff should:

- Know CNCS
- Know AmeriCorps
- Know your commission
- Know your subgrantees
- Know your state

Know CNCS



- ✓ Mission, programs, CNCS organization chart/agency structure, and names of leaders, including CNCS staff working in state field offices
- ✓ Communications and published information; national service branding guidance
- ✓ National Service Community Service Trust Act as amended by the Service America Act
- ✓ Federal budget process and how it translates to state-level processes
- ✓ Rules and regulations, funding opportunities, grant application instructions, grant terms and conditions, monitoring and compliance requirements, FAQs, and on-going guidance and instructions

Know AmeriCorps



- ✓ History, mission; AmeriCorps program cycle, required support
- ✓ Best practices of program development and member support
- ✓ Where to find resources online to support subgrantee program and member development
- ✓ How to support diverse programs
- ✓ How to connect programs to others in the state or national service network

Know Your Commission

- ✓ Grant requirements and commitments made in approved commission grants from CNCS
- ✓ Budgets (approved and routine reports on budgets to actuals), commission financial management process, deadlines; this item may not apply to all commission staff
- ✓ Commission board: membership status, role in commission's operations and state promotion of service, and required composition per national service law
- ✓ Commission organizational context: is your commission a part of state government or nonprofit organization?
- ✓ History of your commission: how has it evolved over the years? What is the State Service Plan? Where is the commission growing or developing?
- ✓ Commission staff role in supervising commission employees; this may vary from state to state (for example, in some states, the commission ED does not supervise the Chief Financial Officer)

Know Your Commission Subgrantees

- ✓ Grant requirements and commitments made in approved subgrants
- ✓ Understand theory of change and logic models as defined and required by CNCS
- ✓ Required performance measures and evaluation requirements of subgrantees
- ✓ How to implement and support all aspects of collecting and using performance data for program improvement
- ✓ The challenges, successes, and lessons learned from individual subgrantees; and how have grant portfolios evolved over the years?

Know Your State



- ✓ Demographics, community needs, existing resources, and institutions (national service and volunteer networks, nonprofits, businesses, schools, universities, government agencies, religious groups, community and other associations, etc.)
- ✓ Key contacts and leaders in the state; are there any notable AmeriCorps alumni in the state?
- ✓ Political climate past and present (e.g., support from the Governor, First Lady, or Lt Governor)

What skills should commission staff have?

As key CNCS partners and leaders in national service, commission staff should be able to:

- Champion national service relentlessly
- Enforce rules and ensure compliance
- Strive for continuous improvement
- Provide high quality TTA
- Communicate complex information
- Thoroughly and consistently document/keep records
- Work effectively with ambiguity

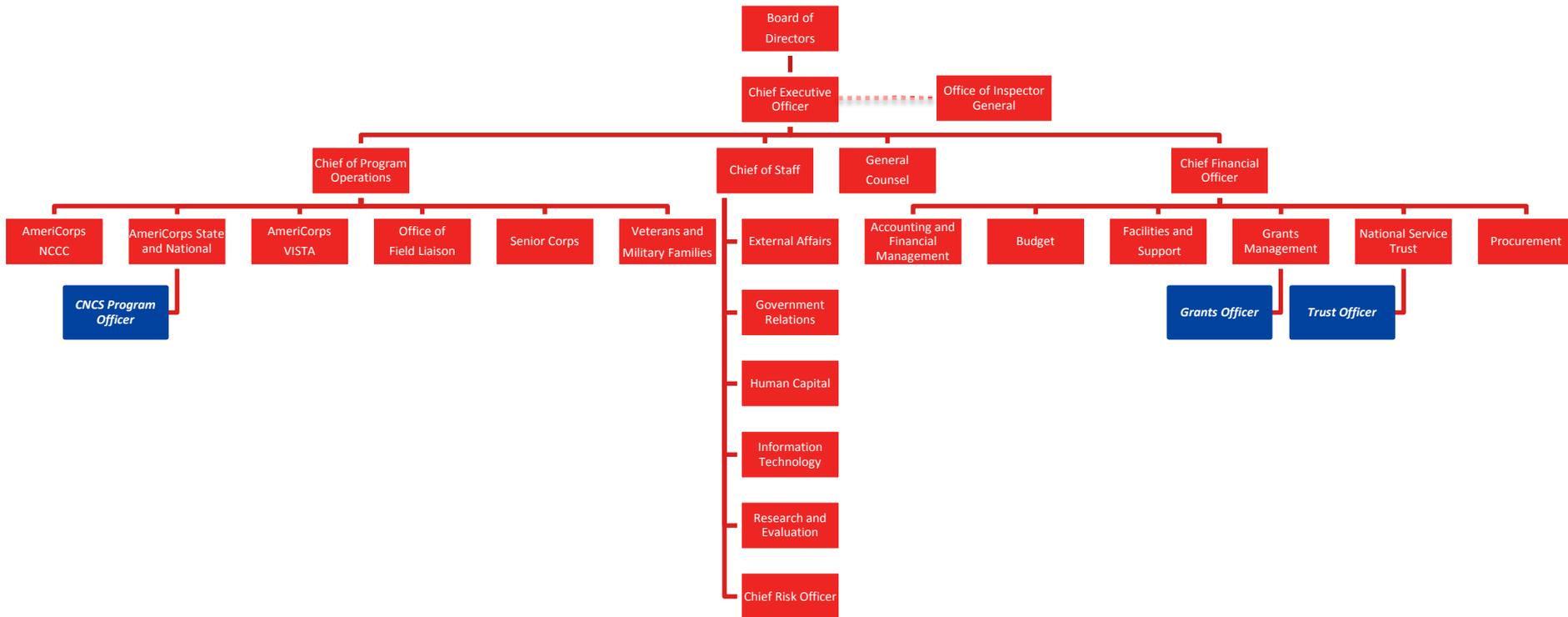
Possible Phases of Learning

- Week 1: Getting started in the AmeriWorld
 - Prohibited and unallowable activities: in general and how they apply to commission staff and subgrantees
 - Staff time rules, grant allocations, and timesheet procedures
 - How to access information: PO and GO, eGrants account, CNCS and ASN email lists, www.nationalservice.gov, Knowledge Network

Possible Phases of Learning

- Month 1: Basic and introductory information about working with CNCS
 - CNCS organizational chart
 - CNCS staff contacts
 - Acronyms and terminology
 - Types of prime ASN grantees
 - Types of grants
 - CNCS grant-making cycle
 - The CNCS relationship

CNCS Organizational Chart—April 2018



CNCS Staff Contacts



All Prime Grantees have 3 key points of contact at CNCS:

Program Officer (PO)

Grants Officer (GO)

National Service Trust
Officer

Key Terminology and Acronyms

Competitive Grant
Cycle

Formula Grant
Cycle

Notice of Funding
Opportunity (NOFO)

Grant Application
Review Process
(GARP)

Grantee Progress
Report (GPR)

Federal Financial
Report (FFR)

Prime Grantee

Subgrantee

eGrants and the
Member Portal

Types of Prime Grantees



**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- Programs that have operating sites and place AmeriCorps members in service in at least 2 states
- Headquarters or parent office applies to CNCS directly for AmeriCorps funds and manages the program and grant funds in the various locations

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- A federally recognized Indian Tribe, band, nation, or other organized group or community, including any Native village, Regional Corporation, Village Corporation, or a tribal organization that is controlled, sanctioned, or chartered by one of the entities mentioned earlier

Types of Prime Grantees

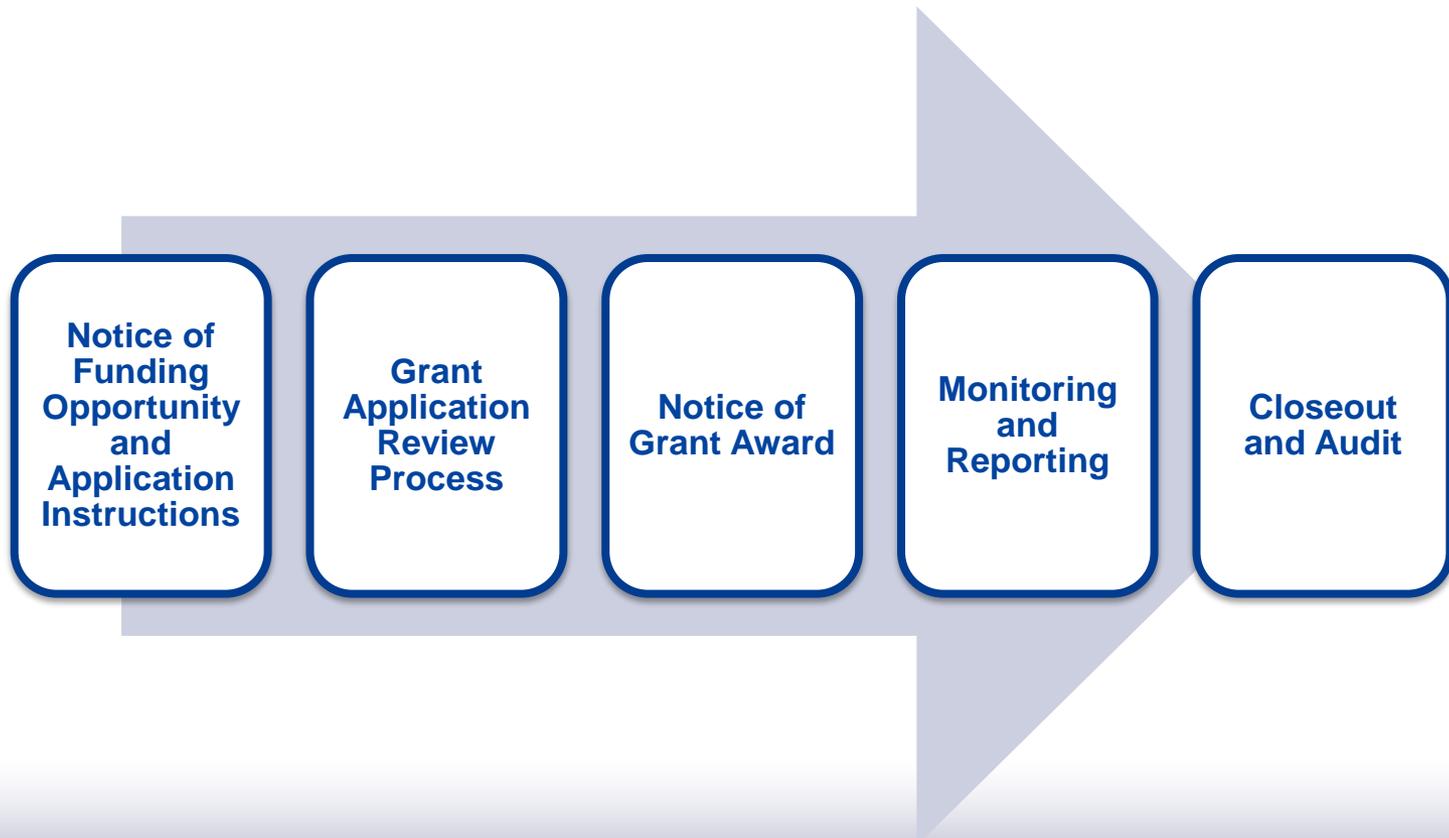
**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- Boards of 15-25 individuals nominated and appointed by a state's governor; oversees the implementation of national and community service and volunteer initiatives in a particular state, US territory, or the District of Columbia
- Employ a small professional staff to manage the AmeriCorps grant portfolio and direct other state initiatives
- Provide funding to single-state AmeriCorps programs

CNCS Grant-making



Grant Cycles



Competitive

Formula

Special

Grant Cycles: Special



Competitive

Formula

Special



*CSG, CIF, VGF,
Targeted Priority,
Program Development*

The CNCS Relationship



Here are few important elements of the commission and CNCS relationship:

- ✓ CNCS expectations of commission ED
 - ✓ CNCS communications
- ✓ Role of the CNCS Program Officer
 - ✓ CNCS agency culture

CNCS Expectations: Commission ED



General Expectations:

- Promote national and community service
- Successfully complete all projects outlined in approved AmeriCorps grant applications (Competitive, Formula, Days of Service, Commission Support, etc.)
- Ensure compliance with all AmeriCorps requirements
- Serve as CNCS primary contact for all AmeriCorps State grant functions

Examples of Specific Commission Director Duties:

- Financial management
- Personnel management (staff, Commissioners)
- Strategic and operational planning and implementation
- Oversight, monitoring, evaluating, and reporting (staff, subgrantees, AmeriCorps members, Commissioners)

Sample Commission ED Tasks

DATE	PRIME GRANTS	SUBGRANTEES	COMMISSION	TRAINING	EVALUATION
January	Submit GPRs, FFRs; submit next year's Competitive Prime application	Monitor current subgrantees; recruit new subapplicants for Formula Prime application	Competitive Prime decision meeting	Subgrantee webinar; resource-sharing	Analyze start-up data; adjust current and next year plans
February	Confirm Portal compliance	Monitor; recruit	Provide routine updates; recruit, orient, and train new commissioners as necessary	Subgrantee webinar; resource-sharing	Collect and analyze data; adjust plans as necessary
March	Confirm Portal compliance	Monitor; recruit	Support; recruit	Subgrantee staff meeting; resource-sharing	Collect and analyze data; adjust plans as necessary
April	Submit GPRs, FFRs; GARP	Monitor; select Formula subgrantees	Support; recruit; service project	Resource-sharing; service project	Collect and analyze data; adjust plans as necessary
May	Confirm Portal compliance	Monitor; select Formula subgrantees	Support; recruit	Life After AmeriCorps	Collect and analyze data; adjust plans as necessary
June	Confirm Portal compliance; submit Formula Prime application	Monitor	Formula Prime decision meeting	Subgrantee staff meeting; resource-sharing	Collect final data

Sample Commission ED Tasks

DATE	PRIME GRANTS	SUBGRANTEES	COMMISSION	TRAINING	EVALUATION
July	Submit GPRs, FFRs; review next year's NGAs	Monitor	Support; recruit	Subgrantee webinar; resource-sharing	Collect final program data and performance reviews
August	Confirm Portal compliance	Monitor; recruit subapplicants for Competitive Prime application	Support; recruit	Preparation; new subgrantee orientation and training	Analyze data; prepare final program year reports; adjust next year plans; update long-term plans
September	Confirm Portal compliance	Monitor; recruit subapplicants	Program year kick-off meeting	Subgrantee webinar; resource-sharing	Collect start-up data
October	Submit GPRs, FFRs; prepare Prime applications	Monitor; recruit subapplicants	Support; recruit	Subgrantee staff meeting; resource-sharing	Collect and analyze data; adjust plans as necessary
November	Confirm Portal compliance; prepare applications	Monitor; select subapplicants	Support; recruit; service project	Subgrantee webinar; resource-sharing; service project	Collect and analyze data; adjust plans as necessary
December	Confirm Portal compliance; prepare applications	Monitor; select subapplicants	Annual meeting and elections	Annual meeting	Collect and analyze data; adjust plans as necessary

Sample CNCS Communications Calendar

 1st or 2nd Tuesdays of the month: AmeriCorps State and National Update Call for state commissions, direct programs, and tribal grantees

 Monthly call with Program Officer: exact date and time will vary

 AmeriCorps Staff Development Webinar: topics and dates vary

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MAY 2018						
		1	2	3	4	5
6	7	8 	9	10	11	12
13	14 	15	16	17	18	19
20	21	22	23	24 	25	26
27	28	29	30	31		

Role of the AmeriCorps State and National Program Officer



The AmeriCorps State and National Program Officer (PO) can help commissions manage the communications and requests from multiple CNCS units. The PO is the primary point of contact at CNCS.

These are the key elements of the PO's job:

- Portfolio management, including TTA
- Grant process support
- AmeriCorps State and National committee work
- CNCS cross-unit committee work

CNCS PO Portfolio Management

- Each PO has a group of AmeriCorps State and National direct and commission grantees that she/he manages.
- In this capacity, the PO:
 - ✓ Monitors grantee performance such as Portal compliance and progress on approved performance measures;
 - ✓ Reviews and clarifies Grantee Progress Reports;
 - ✓ Connects grantees with resources and opportunities to support their work; and
 - ✓ Helps troubleshoot grant or program issues.

Communication Basics (1 of 3)

Types of communication with your PO:

- Online/database contact information
- Phone
- Email
- In-person



Communication Basics (2 of 3)

Be sure to:

- Verify eGrants contacts each month
- Provide 2 contacts for the internal AmeriCorps distribution list when requested (these are email lists used by ASN); update the list when requested
- Sign up for alerts on the CNCS website
- Maintain a schedule of monthly check-in calls with your PO
- Participate in recurring and episodic conference calls scheduled by CNCS
- Always copy your PO on emails sent to other CNCS staff
- Whenever possible and as appropriate, engage your PO in events, service projects, trainings, etc.

Communication Basics (3 of 3)

Be sure your PO has:

- All your great news as soon as possible; don't wait until your GPR to share news of a great accomplishment or meaningful service story; POs love great news!
- Adequate backstory and context on important commission work (especially details that are not part of CNCS-required reports)
- An understanding of special circumstances that impact your ability to be successful
- An immediate heads up on any unexpected developments (for example, a member grievance or notice of investigation from the Office of Inspector General)

Beyond the Basics



- In addition to maintaining regular and positive communication with your PO, there are other ways that you can engage CNCS in commission business or help inform the Corporation's work.
- Each year, there are multiple opportunities for you to share, advise, and volunteer.

Share



- Be pro-active about collecting and sharing powerful stories and images that depict the impact of national service. You can share these stories with CNCS via your PO, on the CNCS website, and through social media.
- This builds our ability to tell the national service story to potential AmeriCorps members, Congress, the general public, etc., and it keeps us all connected to our shared mission of service.



Advise



- Each year, CNCS asks for input on core agency functions via the Federal Register, written surveys, or conference calls.
- It is critical that commissions engage in this type of feedback, since the results of the proposed grant guidance, regulations, or policies will directly impact the communities and members served.
- Sign up for the official email distributions on the CNCS website; and check with your PO about all upcoming opportunities to provide input to CNCS.

Volunteer



- There are also various opportunities to volunteer to help design or deliver aspects of CNCS or AmeriCorps State and National work each year.
- You will receive invitations to help test new grant reports or training materials, speak on panels or webinars, coordinate service projects, and more.
- Check with your PO about all upcoming opportunities to volunteer, and, if your schedule permits, get involved in one or more of these opportunities.

Making the Most of the PO Relationship

In addition to general guidance provided above, commissions also play a key role in making the most of the PO relationship in these ways:

- Directly communicate your support needs or other feedback
- Remind your PO if you've asked for something and not received it in the requested timeframe
- Tailor the agendas for the monthly calls to best meet your needs

CNCS Organizational Culture

- Federal agency; bound by President's budget, Congressional appropriations, government procurement rules, etc.
- Made up of multiple units and staff; 50+ years of national service laws, regulations, staff guidance to navigate; commissions may need to know and manage a variety of programs
- Voluminous communications from various units and staff; requests or deadlines may overlap

Today's Agenda



- ✓ Getting Oriented in Washington:
 - Amber Martin-Jahn, Serve Washington
- ✓ Commission Staff Key Knowledge
- ✓ Commission Staff Key Skills
- ✓ Possible Phases of Learning for New Staff
- ✓ The CNCS Relationship
- Getting Oriented in Massachusetts:
 - Katie Koski and Beth McGuinness, Massachusetts Service Alliance
- Resources
- Q&A and Wrap-up

Getting Oriented in Massachusetts

Katie Koski, Program Officer



Beth McGuinness, Director of Programs



MASSACHUSETTS



SERVICE ALLIANCE



GUIDING NEW STAFF MEMBERS

AmeriCorps | Senior Corps | Volunteer Generation Fund

Corporation for
**NATIONAL &
COMMUNITY
SERVICE** ★★ ★ 



OUR JOURNEY

- Several veteran staff members
- Significant number of new staff members starting within the same time period
- Need for on-boarding process
- Had to be aware of supervisor's and team's other time commitments
- Wanted to find a balance between over-scheduling/whelming new staff members and not providing enough information and work

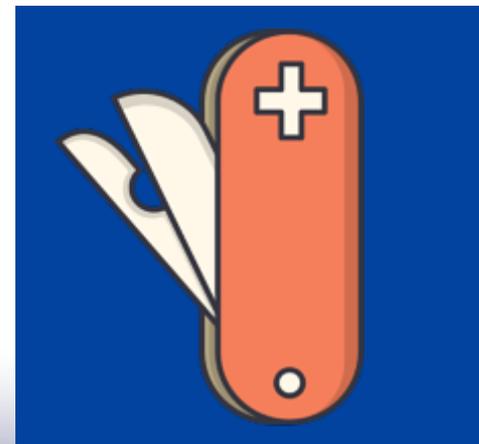
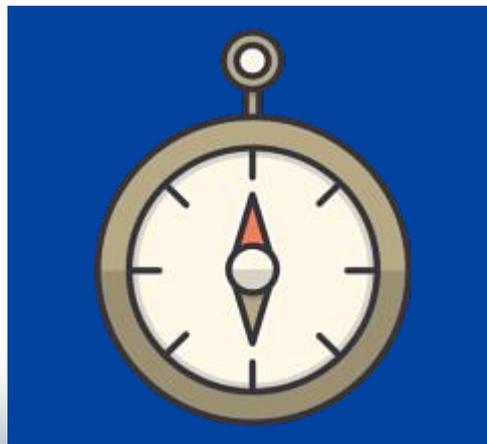
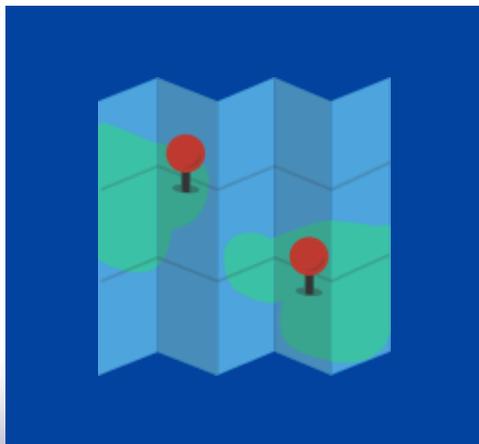


OUR PROCESS

Navigating MSA

Role Orientation

Tools & Resources



Navigating MSA



MSA Orientation

- Adapted and shared board presentation
- One-on-ones with staff members/teams
- Board Meeting

Teambuilding

- Welcome Breakfast
- All staff service day
- Staff lunch



Human Resources & Administrative

- Benefits Package Summary
- “Before your 1st day” intro email
- Desk and email/tech access set up

Human Resources & Administrative Checklist

New Hire Forms

- ✓ Basic Employee Information form
- ✓ Payroll tax (I-9, W-4, M-4)
- ✓ Direct deposit
- ✓ Health insurance
- ✓ Guardian Life insurance/Dental
- ✓ 401(k)

Other

- ✓ Employee handbook (Personnel Employee Status Policy & Benefits Outline)
- ✓ Organization Chart (add new staff members)
- ✓ Reimbursement procedure
- ✓ Timesheet
- ✓ T-pass
- ✓ Order business cards and nametag
- ✓ Name placard for desk
- ✓ Name on individual mailbox

Office Tour

- ✓ Door codes
- ✓ Building key card
- ✓ Using the copier / scanner
- ✓ Office supply area / ordering supplies
- ✓ Tech cabinet

Tech

- ✓ Desk phone and voicemail orientation
- ✓ Outlook account setup
- ✓ Sharing Outlook calendars
- ✓ Account setup (e.g., Salesforce, website, etc.)
- ✓ Bio and photo for website
- ✓ Miscellaneous account login/password info (e.g., Form Assembly, Boston Globe, etc.)
- ✓ P drive (internal shared electronic folders) overview
- ✓ Remote access to desktop, email and voicemail
- ✓ Add new staff to copier and voicemail system

ROLE ORIENTATION



Role Orientation



Training Modules

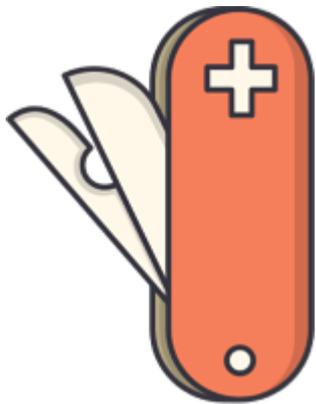
- Grant application cycle/timeline
- Types of grants
- Fiscal Systems
- eGrants
- MSA Program Portfolio
- Introduction to database/reporting tools

Supporting Programs

- Quarterly Program Director meetings
- Site Visits
- Progress Reports
- NSCHC
- Member enrollment/exiting
- Member Training

Overview of Evaluation Program

- Performance Measures
- Logic Model
- Evaluation Plans
- Learning Memos



TOOLS & RESOURCES

Tools & Resources



Internal Tools

- Regularly scheduled 1:1s with supervisor and team meetings
- PD Handbook
- PD Orientation Slides
- MSA AmeriCorps Calendar

External Resources

- Litmos and CNCS Knowledge Network
- ASC Basecamp and PO webinars
- Informal Program Site Visits

Orientation Schedule

		Tuesday, January 23	Wednesday, January 24	Thursday, January 25	Friday, January 26
AM		9:00: Arrive 9:30: Welcome Breakfast 10:00: MSA Orientation	10:00: Staff meeting	10:00: Meet with CEO	TBD: ASC PO Training Series – Module 3: Program Officer Role TBD: ASC PO Training Series – Module 7: Training and Technical Assistance
PM		1:00: Office Overview/ HR Paperwork / meet with Administrative Coordinator Rest of the day: set up desk, email, etc.	1:30: Meet with Director of External Relations TBD: ASC PO Training Series – Module 1: Introduction to CNCS	1:30: Meet with Commonwealth Corps Team TBD: ASC PO Training Series – Module 2: Introduction to ASC	1:30: Meet with Director of Training and Technical Assistance 3:00: Program Fiscal Oversight (SK)
	Monday, January 29	Tuesday, January 30	Wednesday, January 31	Thursday, February 1	Friday, February 2
AM	TBD: ASC PO Training Series – Module 4: Grant Making	9:30: MSA Staff Service Day at the Pine Street Inn	10:00: Staff meeting	10:30: Planning for February PD Meeting	11:00: eGrants overview
PM	1:00: Grant Application Cycle (BM) TBD: ASC PO Training Series – Module 5: Program Development	1:00: Portfolio Review (SK) TBD: ASC PO Training Series – Module 6: Monitoring and Compliance	1:00: Program Management and Support (SK)	1:00: Salesforce and Form Assembly Overview TBD: ASC PO Training Series – Module 8: Reporting and Data Quality	To Be Scheduled: • Evaluation Overview

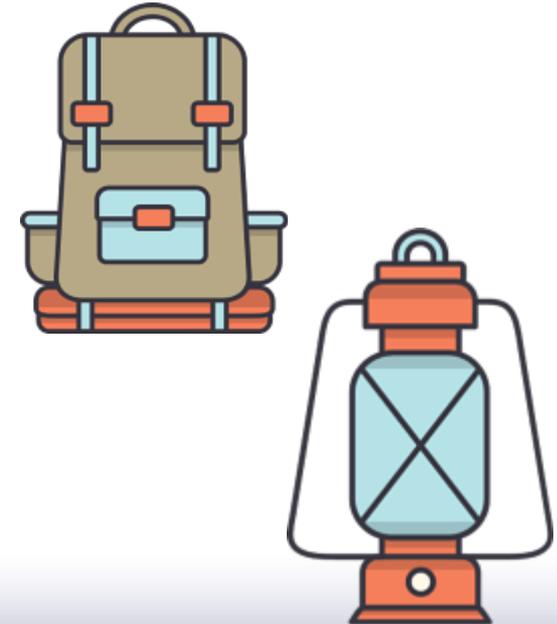
Additional Insights

Continuing Education

- In-time training modules (e.g., how to conduct site visits, reviewing progress reports, reviewing and submitting reimbursements requests, etc.)
- CNCS/ASC calls and webinars
- Conferences

Opportunities to Improve Our Process

- Online on-boarding system
- Mini-projects for the first few weeks
- Resources to review during down-time





THANK YOU!

Beth McGuinness: BMcGuinness@mass-service.org

Katie Koski: kkoski@mass-service.org

Resources

- Sign up for CNCS email lists:
 - www.nationalservice.gov; “Sign up to stay informed!” link in lower right corner
- Managing AmeriCorps Grants:
 - www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants
- Grant Terms and Conditions:
 - www.nationalservice.gov/resources/financial-management/terms-conditions-and-certifications-assurances-cn-cs-grants
- GPR Resources:
 - www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants/ameri-corps-state-and-national-grantee-progress
- AmeriCorps State and National Knowledge Network:
 - www.nationalservice.gov/resources/ameri-corps

What questions do you have?



Wrap-up for Today



- Please share feedback on today's webinar:
www.surveymonkey.com/r/CommissionOrientation
- The recording of today's presentation will be posted on the Knowledge Network in early June:
www.nationalservice.gov/resources/americorps

Next Staff Development Webinar

- Next AmeriCorps Staff Development Webinar:

June 14, 3:00 – 4:30 pm Eastern

Topic:

*CNCS Orientation for New Program Staff –
For Directs and Tribal Programs*

Thank you!

